

INSTRUCTION SHEET

FITNESS REPORT

FORM NO.

FITNESS REPORT

GENERAL

DESCRIPTION: The Fitness Report is a single-part form which is used to evaluate the job performance during a specified period of the Organization's staff employees and staff agents. It is designed to (1) elicit the supervisor's opinion concerning the job performance of employees, (2) serve as an aid in locating individuals with special skills which can be utilized in particular assignments and (3) insure that employees are informed where they stand with their supervisors. The Fitness Report will be completed in all cases where an initial, annual, or reassignment report is required. Employees at GS levels 15 through 18 may be evaluated either in a memorandum report or on the Fitness Report form. This Fitness Report is designed for the rater. It is the reviewer's responsibility of deciding whether the rater is underrating or overrating the employee. If so, the reviewing officer should complete a copy of the form, add it to the supervisor's and send them both to the Office of Personnel. The reviewer should also add on his copy any comments or information which will lead to a better understanding of this report.

FOR THE ADMINISTRATIVE OFFICER: The Fitness Report will be prepared in accordance with [ ] and will be submitted in triplicate (in ink or typed) to the Office of Personnel. If this is the initial report on the employee, it must be completed and forwarded to the Office of Personnel no later than ten months after the EOD date.

INSTRUCTIONS

FOR THE SUPERVISOR: Organization policy requires that supervisors inform a subordinate where he stands with him. Therefore, the initial or annual fitness report (or its memorandum equivalent for GS-15 through 18) must be shown to a subordinate except under conditions specified under [ ]. Note that reassignment reports are not required to be shown to the employee. Reassignments are so frequently made under conditions of time pressure that it is frequently very difficult to arrange for the proper kind of interview between supervisor and subordinate involved. Because of this reassignment reports need not be shown.

Section I GENERAL - Self-explanatory

## Section II JOB PERFORMANCE EVALUATION

Item 1 Ratings on Performance of Specific Duties - In this item the supervisor lists specifically the most important duties the employee has performed during the rating period and rates each duty separately. The duties should be listed in order of importance. Compare when possible the individual being rated with others performing the same duty at a similar level of responsibility. Two individuals with the same job title may be performing different duties. If so, rate them on different duties. In making these ratings, consider only how well the employee performs the specific duty. Very careful consideration should be given to the listing of duties and the rating given each duty because this section is an important basis for the evaluation of the employee for future assignments. Be very specific in describing the duties. If the job requires maintaining files, say what kind; if it requires preparing contributions to NIS chapters, say which chapters; if it requires interviewing job applicants, say what level or for what kind of jobs; if it requires conducting investigations, tell what kind and for what purpose; if it requires liaison activities, tell what kind and with whom; if it requires analyzing reports or preparing reports, tell what kind, what subjects, and for what purpose. In general, list the duties in terms in which you would like to have them listed if you were reading the report and wanted to know whether the individual had the skills needed for a particular job.

Item 2 Ratings on General Performance of Duties - In making this rating the supervisor should take into account employee's conduct on the job as well as performance on all specific job duties. Each supervisor will weigh these factors in his own mind so as to arrive at a rating which will reflect an employee's value on the job. It is quite possible for an individual to be rated high on a number of specific duties and yet rated average or below on overall performance because his conduct on the job interferes with getting the work done. Conversely, a person with relatively low ratings on specific duties may be rated high on over-all job performance because his conduct on the job facilitates the work of the office, because he serves as a sparkplug for the team, etc.

Item 3 Narrative Description of Manner of Job Performance - In this item the supervisor should elaborate on the strengths and weaknesses of the employee in any manner needed to explain his ratings in Item 1 and 2 of this section. In addition, the supervisor may comment here on any extenuating circumstances which affect the productivity and effectiveness of the employee. In this section the supervisor should indicate the suggestions given to the employee for the improvement of his work.

### Section III CERTIFICATION

Raters should refer to [ ] for guidance concerning exceptions of showing this report to the employee being rated.

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#### SUGGESTED PROCEDURE TO THE RATER FOR COMPLETING THE REPORT

The following procedure is suggested as an aid to the supervisor in discussing the employee's performance with him.

General: The report should be completed jointly. Plenty of time should be allowed for discussion since nothing is less satisfying to the employee than to leave an interview concerning his Fitness Report without having all his questions fully answered.

#### Specific:

1. The supervisor and employee together work out the specific duties to be listed in the report.
2. The supervisor asks the employee which duties he prefers.
3. The supervisor indicates which duties he considers the most important.
4. Differences in the opinion of the supervisor and employee on importance and differences between the important and preferred duties serve as a good basis for discussion.
5. The supervisor indicates to the employee his rating on each duty, explaining why, utilizing specific instances, stressing ways to improve performance whenever appropriate.
6. During this discussion, the employee should be given ample opportunity to react to the supervisor's statements and, when appropriate, to present his side of the case.
7. The supervisor proceeds to the overall rating, discussing at this time general conduct on the job, attendance, completion of assignments on time, and so forth, stressing particularly those aspects which make the individual's rating something different than an arithmetical average of his performance on specific duties.
8. The supervisor can then proceed with the narrative description, continuing the discussion on any point on which the employee needs or desires clarification.
9. This procedure results in a report in draft. After both supervisor and employee have read it, it can be typed in the appropriate number of copies. Both supervisor and employee sign the original typed copy except when the report is not shown to the employee in accordance with the policy laid down in [ ] In this event, the supervisor only signs the report.

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